SENIOR NEEDS ASSESSMENT TASK FORCE
CITY OF LAFAYETTE

To: Lafayette City Council
From: Senior Needs Assessment Task Force, City of Lafayette
Re: Status Report and Recommendations
Dated: February 20, 2009

I. Recommendation

The Senior Needs Assessment Task Force (SNATF) recommends that the City Council approve its selection of BW Research for the Senior Needs Assessment for the City of Lafayette and requests the Council to fund the project with $29,750 from the General Fund. The Senior Needs Assessment Task Force agrees to continue to pursue outside funding for the project and will reimburse the City with funds raised. We currently estimate this amount to be $10,000.

II. Background of the Project

On September 24, 2007, the Lafayette City Council, at the request of the Lafayette Senior Services Commission, approved the formation of a Senior Needs Assessment Task Force to:

- Develop and issue a request for proposal (RFP) to qualified consultants for a comprehensive needs assessment
- Evaluate responses to the RFP and select the firm which best meets Lafayette's needs
- Recommend to the City Council approval of its consultant selection and request funding as necessary
- Pursue and secure alternative funding

III. Importance of the Project

- The assessment will give the City accurate and statistically valid data regarding the needs of older adults in Lafayette.
- The project is timely as the current size of the senior (65 and over) population is estimated by BAE, the consulting firm on the Downtown Strategic Plan Project, at just over 16.3% and they project that it will increase to 18.9% by the year 2011.
- As we prepare for the future it is important for the City to have the information the assessment will provide and allow it to consider its findings along with the Downtown Strategic Plan.
- Accurate and statistically valid data will also enhance our ability to tap outside sources for funds to support future projects to make Lafayette a more aging-friendly community.

IV. Key Objectives for the Project

- To gain an understanding of community-wide needs, attitudes, opinions, and behaviors regarding education; financial counseling; housing (aging-in-place and downsizing); medical and nutrition needs; referral assistance; recreation; safety; socialization; and transportation for seniors
- To identify the extent to which the current and anticipated future needs of seniors in Lafayette are being met
- To recommend both short-term and long-term strategies which might be considered for programs, services, and facilities for older adults
- To provide the City with reliable and valid data for making programmatic changes and allocating scarce resources

V. Status of the Project

The first step the task force took was to research and analyze Senior Needs Assessments which had been conducted for other jurisdictions. They included surveys done for Danville; Orinda; the Monument Blvd. Corridor, Concord; Lake Oswego, OR; Oakland; and Los Angeles.

Venue	Focus	Cost
Danville - 2007	Only on recreation	$40,000
Orinda - 2000	Single mail survey focused mainly on housing	$10,000
Monument Blvd.- 2006	Linguistically and culturally isolated seniors	$20,000*
Lake Oswego - 2005	Broad in scope and methodology	$60,000
Oakland - 2005	Broad in scope (conducted by city staff)	>$100,000
Los Angeles - 2005	Broad in scope (16,000 respondents) and methodology	?

* Two unpaid UCB graduate students under the direction of Andrew E. Scharlach, Ph.D., Kleiner Professor of Aging, University of California, Berkeley, conducted the study. In addition ten trained interviewers were paid $15 per completed interview. We inquired if using this approach would be a possibility for the Lafayette study and were advised by Dr. Scharlach that due to conflicting commitments that would not be possible. We also investigated involving teams from USC's Andrus School of Gerontology and Portland State University's Survey Research Laboratory but the travel and time costs made those alternatives prohibitively expensive.

The task force developed and issued the RFP to five consultant research firms. The recipients had been selected from a list of eleven potential candidates, some of whom were either not interested in a study of this small scope or implied that their estimated costs for this project were much higher than we felt Lafayette could afford. We evaluated the responses and selected BW Research.

SNATF is now in the process of securing funding. We recognize that the City faces financial constraints and it is incumbent upon the task force to raise as much funding as it can from outside sources. Funds are being sought from local organizations and individuals and numerous foundations interested in senior affairs. At this time we calculate we will be able to raise an estimated $10,000.

VI. Timeline for the project

BW Research estimates it will take up to four months to complete the entire project. However, the four month estimate includes up to one week of review time by the City for each deliverable. If needed, the project timeline could be completed in closer to three months by including shorter review times.

Phase I Review of Background Research and Population Demographics Week 1

- Project kick-off meeting
- Review of background research and population demographics

Phase II Community Workshops and Executive interviews Weeks 2-6

- Develop content and format of community workshops
- Hold workshops
- Compile list for executive interviews
- Develop discussion guide for executive interviews
- Conduct executive interviews with stakeholders

Phase III Statistically Reliable Survey Weeks 7-12

- Develop sampling plan
- Evaluate findings from Phases I and II
- Develop, review, and revise draft survey
- Purchase, verify, cluster, and stratify listed sample of residents
- Program and pre-test the survey
- Revise based on pre-testing
- Conduct 400 telephone interviews with senior residents

Phase IV Data Analysis, Report Writing, and Presentation of Results Weeks 13-18

- Compile, process, and analyze the data
- Prepare an initial question-by-question summary of the survey results
- Review findings with the task force
- Develop a comprehensive written report of the findings
- Conduct second review with the task force and revise as necessary
- Prepare presentation of findings accompanied by a PowerPoint slide presentation
- Review and revise presentation as necessary
- Finalize and present results

Phase V Consultant Available to Answer Questions on the Research Ongoing

VII. Itemized Budget for the Project

The Senior Needs Assessment Task Force recommends that the City contract with BW Research for Option 1 of their proposal which includes two community workshops, ten executive interviews, and telephone survey using a sample size of 400 with a 12 minute survey interview. Community Workshops, Executive Interviews, and Telephone Survey

Activity	Hours	Cost
Review research and demographics	15	$ 1,450
Plan and moderate community workshops *	60	4,950
Plan and implement executive interviews	30	2.450
List sample research and development	10	1,250
Survey training, pre-testing and monitoring	25	725
Telephone interviews	220	7,700
Survey programming	15	750
Data processing	30	1,725
Research and analysis	100	8,250
Miscellaneous expenses	-	500
Project total	**505**	**$29,750**

* Does not included costs associated with the meeting site, print materials, and refreshments.

VIII. Fund Raising Efforts

The Task Force has identified the following organizations and foundations as potential grantors for this project. Formal applications can not be submitted until the cost of the project has been established.

Lafayette Community Foundation
Lafayette Chamber of Commerce
Rotary Club of Lamorinda Sunrise
California Endowment
The San Francisco Foundation
The Robert Wood Johnson Foundation
The Harry and Jeanette Weinberg Foundation, Inc.
Kaiser Permanente Community Benefits Program
Vera M. Long Foundation
Thomas J. Long Foundation
MetLife Foundation
Rotary Club of Lafayette
Lafayette Juniors
Soroptimist International of Lamorinda
The Bill and Melinda Gates Foundation
The John A. Hartford Foundation, Inc.
Dean and Margaret Lesher Foundation
Philanthropic Endeavors Foundation
Y & H Soda Foundation
The J.M. Long Foundation
Helen Andrus Benedict Foundation
Sierra Health Fund

IX. Senior Needs Assessment Task Force Members

Carl Anduri
Marechal Duncan
Dick Holt
Lois Laine
Mei Sun Li - City Staff
Ruth McCahan - Chair
Robert Nolan
Mary Anne Winig